BANNER REPORTS

You can extract data from Banner finance queries and put them into a spreadsheet to create whatever kind of report you might need. You can extract/download data from either Self Service or Administrative Banner.

SELF SERVICE

- Create your budget query.
 - 1. You can use Comparative Queries to isolate spending within the same fiscal year.
 - 2. You can use Comparative Queries for multiple fiscal year information.

• You then get an excel sheet that you can edit any way you want.

- 3. Comparative Queries can add, subtract, or be a percentage of 2 columns of information.
- 4. It's better to only use 1 column of info for Comparative Queries, i.e. 'YTD'.
- Click on 'Download Selected Ledger Columns' button underneath your query information.
- You will get a message that says "Do you want to open or save bwlfksdld.csv?" Select 'OPEN'.

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BANNER FINANCE REPORTS

ADMINISTRATIVE

Most useful information from Administrative Banner comes for Payroll Queries – NHIDIST or transaction detail queries – FGITRND.

Payroll Query

- Type in NHIDIST and hit enter.
- Tab down and enter the beginning and ending dates you want for your query.
- Tab to the Fund field and enter your fund your org should default. Next Block.
- You can hit 'F8' to get everyone paid for that time period from that budget.
- If you want to query one person, enter the last name and hit 'F8'.
- Once you have the information you want, click 'HELP' up in the menu bar.

This will open an Excel spreadsheet that you can now edit how you please.

• Click on 'Extract Data No Key'. This will open another web browser tab with Ipar3.jsu.edu on it and ask if you want to Open or Save the file. Click on Open. Pop-up blockers must be off for this process to work.

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BANNER FINANCE REPORTS

ADMINISTRATIVE

Transaction Query

- Type in FGITRND and hit enter.
- Type in the FOAP you want to query this query work better with one account code, but you can leave it blank. Next Block.
- There are several fields you can query on if you want all your '7' accounts, put 7% in the Account Code field and hit 'F8'. If you want a specific account, enter it in the Account Code field and hit 'F8'.
- Click on 'Extract Data No Key' which opens another web browser tab and asks if you want to Open or Save the File. Click on Open.

• This will open an Excel spreadsheet which you can now edit as you please.

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